



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Strategic Technology Integration Plan

1. Phase 1

a. TASKING:

CONTRACTOR will conduct 10 department/program level interviews and document their outcomes. Provide a copy of the interview notes.

FINDINGS:

During the course of the contract the decision was made by the contract administrator to focus the in-depth department/program interviews on the eight primary departments:

1. Behavioral Health Services
2. Communications
3. Financial & Homeless Employment
4. King County Homeless & Incarcerated Services
5. Melinda Gourley, Financial Consultant
6. Service Center & DSHS Enhancement
7. Transitional Housing Services/Building 9
8. Veterans Estate Management Program

Interview notes were transcribed, business processes and flows are included in each of the department reports. See Appendix A for list of documents for interview notes.

The following table reflects the business processes and tasks summary by WDVA program.

WDVA Program	Number of Major Processes	Number of process tasks	Manual: Paper Process	Manual Process Automated by VRMS	MS Office Tools	MS Office Features & Functionality Automated by VRMS	Licensed Software	Licensed Software Features & Functionality Automated by VRMS
Behavioral Health Services	9	60	48	47	8	8	0	0
Communications Department	4	11	0	0	0	0	11	11
Financial & Homeless	9	44	38	38	1	1	0	0
Financial Consultant	20	68	2	2	66	65	0	0
King County	10	53	35	31	10	10	0	0
Service Center & DSHS Enhancement	9	43	36	36	5	5	0	0
Transitional Housing (Building 9)	14	57	53	52	0	0	2	2
VEMP	5	31	17	17	1	1	13	13
Totals	80	367	229	223	91	90	26	26

The following recommendations address identifies the processing issues based on interview with departments and individuals.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

Behavioral Health Services

1. There are nine major business processes within the Behavioral Health Services program. There are 60 process tasks within these nine major processes.
2. 80% of their business process tasks are manual
3. 78% of these manual tasks can be automated by a Veteran business process management and automation solutions
4. 13% of their business process tasks are performed using a Microsoft Office tool, of which all of these tasks can also be automated by a Veteran business process management and automation solutions

Communications Department

1. There are four major processes within the Communications Department during its collaborative work with WDVA's veterans Services and Behavioral Health Services department. There are 11 processes tasks within these four major processes.
2. There are 11 processes tasks that can be automated that would provide a shared platform in managing content and customer service.

Financial & Homeless Employment Services Program

1. There are nine major processes in Financial & Homeless Employment Services program. There are 44 process tasks within these nine major processes.
2. 86% of their business process tasks are manual
3. 100% of these manual tasks can be automated by a Veteran business process management and automation solutions
4. 2% of their business process tasks are performed using a Microsoft Office tool, of which all of these tasks can also be automated by a Veteran business process management and automation solutions

King County Homeless & Incarcerated Services

1. There are 10 major processes performed by the King County Call Center. There are 53 process tasks within these 10 major processes.
2. 66% of their business process tasks are manual
3. 58% of these manual tasks can be automated by a Veteran business process management and automation solutions
4. 19% of their business process tasks are performed using a Microsoft Office tool, of which 96% of these tasks can also be automated by a Veteran business process management and automation solutions



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

Melinda Gourley, Financial Consultant

1. There are 20 major processes performed by the Financial Consultant. There are 68 process tasks within these 20 major processes.
2. 86% of their business process tasks are manual
3. 3% of these manual tasks can be automated by a Veteran business process management and automation solutions
4. 97% of their business process tasks are performed using a Microsoft Office tool, of which 96% of these tasks can also be automated by a Veteran business process management and automation solutions

Service Center & DSHS Enhancement

1. There are nine major processes performed by the Service Center & DSHS Enhancement program. There are 43 process tasks within these nine major processes.
2. 84% of their business process tasks are manual
3. 100% of these manual tasks can be automated by a Veteran business process management and automation solutions
4. 5% of their business process tasks are performed using a Microsoft Office tool, of which 100% of these tasks can also be automated by a Veteran business process management and automation solutions

Transitional Housing Services/Building 9

1. There are 14 major processes performed by the Service Center & DSHS Enhancement program. There are 57 process tasks within these 14 major processes.
2. 93% of their business process tasks are manual
3. 91% of these manual tasks can be automated by a Veteran business process management and automation solutions
4. 2% of their business process tasks are performed using a licensed software solution, of which 100% of these tasks can also be automated by a Veteran business process management and automation solutions
5. Veterans Estate Management Program

Veterans Estate Management Program (VEMP)

1. There are 5 major processes performed by the Service Center & DSHS Enhancement program. There are 31 process tasks within these 5 major processes.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

2. 55% of their business process tasks are manual
3. 55% of these manual tasks can be automated by a Veteran business process management and automation solutions
4. 3% of their business process tasks are performed using Microsoft Office tools of which 100% of these tasks can also be automated by a Veteran business process management and automation solutions
5. 13% of their business process tasks are performed using a licensed software solution, of which 100% of these tasks can also be automated by a Veteran business process management and automation solutions

RECOMMENDATIONS:

Global Suggestions:

1. Embrace standards based automation immediately and move to designing a system which harvests the large number of gains through automating WDVA's core business processes using modern data processing tools.
2. Based on the capabilities of the tools, redesign the underlying processes to optimize the power of the new tools – that means work with each group to fundamentally change HOW the WDVA does business by sharing data and bringing all stakeholders together in one global effort as opposed to stove piped, discrete efforts.
3. This requires buy-in at the Federal level, cooperation between states to ensure data flows smoothly between veteran state agencies and veteran service organizations, counties, communities, and participating commercial partners.

b. TASKING:

CONTRACTOR will identify optimization points, including, but not limited to:

- 1) Routine and repetitive tasks that can be easily handled by technology
- 2) Manual, paper based tasks, processes and methodologies capable of being automated.
- 3) Analyze Veteran to AGENCY interfacing that can be replaced by self-service technology interfaces.

FINDINGS:

WDVA work processes are almost exclusively manual – with minor automation from basic standalone spreadsheets. 80 specific WDVA functions were identified and fully decomposed. 62% of them are entirely manual with 97% of those steps as good candidates for automation. See the Business Process – Touch Point spreadsheet for specifics. Selection of the VRMS architecture vastly simplifies applying self-service technology which in turn fundamentally drives down WDVA counselor interaction and associated costs.

Because there are no legacy systems, building and data load issues will be simplified. By bringing primary data down from authoritative databases a significant gain in data quality can be achieved while minimizing the costs associated with data migration from manual to online records.



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

RECOMMENDATIONS:

Automate. 93% of WDVA process tasks can be automated with a business process management automation solution. There are 80 major WDVA business processes were identified and mapped, identifying 367 tasks across all major processes. Major processes reflect interviews with 29% of WDVA staff. The remaining 71% are duplicate functions, program managers, or other minor business functions within WDVA. 62% of WDVA's major business process tasks that are performed manually. 25% of these 80 major process tasks are processed using Microsoft Office tools and 7% of these major process tasks are processed using licensed software.

1. **Manual tasks:** Automate 97% of these manual business process tasks which can benefit from a business process management and automation solution.
2. **Microsoft Office tools:** Automate 99% of these Microsoft Office tasks which can benefit from a business process management and automation solution.
3. **Licensed software:** Automate or integration existing licensed software solutions into a business process management and automation solution.

The following table reflects key summary information regarding WDVA business processes across the Behavioral Health Services, Communications, Financial & Homeless Employment, King County Homeless & Incarcerated Services, Melinda Gourley, Financial Consultant, Service Center & DSHS Enhancement, Transitional Housing Services/Building 9, and Veterans Estate Management Program.

Key Findings	Total	Percentage
FTEs Interviewed for key business processes identification	17	29%
Remaining FTEs to be interviewed	41	71%
Major business processes defined	80	N/A
Business process tasks identified within major processes	367	N/A
Manual processes tasks	229	62%
Manual processes tasks automated by VAPP VRMS	223	97%
Number of processes tasks using Microsoft Office	91	25%
Number of processes tasks using Microsoft Office automated by VAPP VRMS	90	99%
Number of process tasks using licensed software	27	7%
Number of process tasks using licensed software automated by VAPP VRMS	27	100%
Total process tasks automated by VAPP VRMS	340	93%



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

c. TASKING:

CONTRACTOR will conduct up to six (6) Veteran Focus groups to gain end user information and document anecdotal results.

FINDINGS:

These interviews were moved to a later phase of development beyond this contract due to the need to focus on WDVA internal departments first and in greater depth than was originally planned. Gathering end user inputs at this point would be premature and therefore an inefficient use of resources; this will happen concurrently during the development of the prototype. The scope of requirements and data structures will be set by funding limits and must first be resolved.

RECOMMENDATIONS:

Employ Focus Groups when the solution architecture has been agreed upon by the primary stakeholders and there is a technical foundation upon which to build structured interfaces and establish policies for information interchange.

d. TASKING:

CONTRACTOR will gather data and reports on trend and preferences of Veterans search criteria through the VAPP and other means.

FINDINGS:

VAPP.com data, trends, and preferences of Veterans searches in VAPP Resources reflect the following Top 25 search terms:

- | | |
|-------------------|-------------------------|
| 1. Cash | 14. Loan |
| 2. Food | 15. Money |
| 3. PTSD | 16. DD214 |
| 4. Hotlines | 17. Emergency Shelter |
| 5. Shelter | 18. Discounts |
| 6. Housing | 19. VA Home Loan |
| 7. VFW | 20. VA work Study |
| 8. Benefits | 21. American Legion |
| 9. Jobs | 22. Helmets to Hardhats |
| 10. VA Disability | 23. University |
| 11. Hospital | 24. Careers |
| 12. Education | 25. Disability Claim |
| 13. Employment | |



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

RECOMMENDATIONS:

WDVA should query and collaborate with WIN 211 across Washington State counties to identify other key search terms or reason for calling WIN 211 call centers for additional Veteran search preferences.

e. TASKING:

CONTRACTOR will propose a data collection tool that identifies the needs of Veterans and their families based on actual service utilization and queries.

FINDINGS:

OMF recommends the inclusion of core functions on the proposed VRMS system using the NEXUS feature to provide widest possible dissemination and consumption of common data. Utilizing a government system to conduct work force automation makes economic and strategic sense and is in keeping with providing a strong portfolio of core solutions which form the foundation for re-engineering basic business processes not only at the WDVA but also between all stakeholders.

For specific functions which do not justify the expense of coding or which are in rapid change, OMF recommends building dedicated “APPS” and hosting them on the VAPP.com platform. This is a cost effective and proven method for rapidly prototyping and gathering real world feedback and is an invaluable tool for design support. Experience shows that over time as requirements set matures or at least stabilizes, the ability to include it under the VRMS module will reveal itself, thus enabling significant cost savings against the lifecycle of the product. A good example would be the TBI module. We know that it should be a key component of VRMS but might best be tested and brought online sooner through a standalone APP.

RECOMMENDATIONS:

Bifurcate thinking. Shift all primary work processes and tools to VRMS and use the VAPP.com platform as a cost-effective development and/or long term support platform.



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

2 Phase 2

a. TASKING:

CONTRACTOR will produce and deliver the process engineering flow charts and supporting documentation based on the departmental/program interviews and make the following assessments:

FINDINGS:

- Flow charts are broken out by department in the department reports.
- Organizational Touch Points and Business Functions are summarized in a single spreadsheet and included for review.

See Appendix B for the following business process document checklist for each WDVA program:

1. Business process Step 1-Trigger-Events-Process Identification
2. Business process Step 2-Major Processes
3. Business process Step 3-Units in Processes
4. Business process Step 4-Process Profile Worksheets
5. Business process Process-Maps (flow chart)

RECOMMENDATIONS:

1. **Major processes validation:** Validate identified business processes documented with WDVA staff members interviewed.
2. **Unit-level validation:** Validate units within each major process with each WDVA staff member interviewed.
3. **Task-level analysis:** Validate tasks within each major process and units with each WDVA staff member interviewed.
4. **Perform action-level analysis and validation:** Identify and validate actions within each process, units, and tasks with WDVA staff members.

b. TASKING:

CONTRACTOR will review and make recommendation to implement available emerging federal VA "Digits to Digits" or D2D.

Stakeholder Enterprise Protocols (SEP) and e-benefits opportunities to reduce manual and/or error prone processes.

- 1) Examples include but not limited to: Integrate Veteran profile data collected via VAPP within Client Tracker system at a greater pace.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

- 2) Suggest a paperless DD-214 data transfer process to capture data using scanner or other means into AGENCY database with easy identification of file and easy retrieval of DD 214.

FINDINGS:

D2D, SEP AND e-benefits standards and systems have established the core framework for how veteran claims and benefits will be set up, tracked, and delivered on a national scale. These standards are comprehensive but currently limited to the federal agencies. There is currently no provision for either communicating with or sharing data with state or local government or the commercial or not for profit service sector. This creates inherent information and support channel conflict by inviting miscommunication and lack of coordination of resources in the field.

There is no substitute for a common veteran data profile derived from and supporting the authoritative data bases maintained by the Federal VA. All else is cost prohibitive and leads to derivative, unreliable, unsynchronized data – compromising its usefulness and the ability of the WDVA to use it as a basis for expending benefits support. All non-primary systems share this fundamental, fatal flaw.

RECOMMENDATIONS:

Federal automation initiatives are of such scope and utility that WDVA should simply conform to their standards and plug into their system. Investigation revealed the benefits of working within such a framework and sharing data between all levels of government validated initial expectations and offers great promise in lowering the overall cost of administering State and County programs as well as speeding up service and automatically gathering the metrics needed to run and optimize delivery.

Pursue charter from the Federal VA to pilot a state module for VRMS which builds in a flexible NEXUS communication center to allow all stakeholders to share data and come together for the veteran.

c. TASKING:

CONTRACTOR will develop a follow-on plan of receiving an electronic transfer of the DD 214s from the Federal Government (DOD or Federal VA). Identify cost savings and/or metrics which will be a cost savings to the organization, reduce waste (time & resources) and create greater accuracy, file space, etc.

FINDINGS:

The DD-214 is the primary key document needed to unlock all veteran support benefits. The importance of having an “always on” availability to a veteran’s online record cannot be overstated. Every process would be



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

vastly accelerated due to eliminating delays in obtaining manual (faxed or mailed) hard copies of DD-214s and other primary documents needed to process claims or benefits.

Further, providing an online capability which would facilitate agencies and veteran support groups to collaborate in support of an individual benefit would significantly lower costs and time to service while reinforcing the principal of acting as a community. It would also assist in eliminating opportunities for intentional fraud.

Studying the problem reinforced the WDVA's commitment to avoid building redundant or "stove-piped" solutions, but rather work with existing systems and extend their reach and utility within the WDVA. The goal is to provide WDVA counselors and processors with online access to critical federal data and work together for the common good not to build systems for the sake of being a system owner.

Key Findings: There are 80 primary Business Functions performed at the WDVA. These require 367 individual steps. Of these 80 primary Business Functions, 20 require Federal data. Most of these steps are foundational for performing WDVA processes. See the Attached Business Function – Touch Point spreadsheet. 97% of the manual processes would benefit substantially from automation.

The gains in efficiency can only be estimated as multiple orders of magnitude. Estimating the cost savings of moving from the current manual processes to fully automated processes with online access to the tools would create significant cost savings while simultaneously lowering frustration. Most of the process would be designed to be self-service based, significantly reducing WDVA manpower requirements.

RECOMMENDATIONS:

DO NOT BUILD A STAND ALONE WDVA DD-214 TRANSFER SYSTEM. Not only would it be cost prohibitive due to the redundancy in already online or soon to be online federal VA systems, it would violate the principles of good system architecture to share common data rather than build repositories of duplicate non-primary data.

Work with the Federal VA to make not only the DD-214 available to veterans but the rest of the veteran's records and forms in support of state initiatives and care. Shift viewpoint to a global, consolidated point of view.

Recommend means and criteria for secure data storage and cost associated with each option.

FINDINGS:

The emerging architecture would be to place the state's VRMS module of the Federal VA's VBMS behind the federal firewall in a secure federal data center – preferably physically collocated with VBMS. Scoping, sizing, and



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

cost-estimating both operations and storage costs for this new solution are beyond the scope of this contract and will be addressed in follow on investigations assuming a National Data Share agreement and cooperative development effort is approved.

RECOMMENDATIONS:

1. Secure a National Data Share Agreement – implement VA approved data exchange protocols
2. Put the VRMS application and data behind the federal firewall
3. Share data with the entire veteran support ecosystem – federal, states, counties, commercial and non-profit service organizations using a role based sign in protocol

d. TASKING:

CONTRACTOR will analyze the integration points of AGENCY'S Client Relationship Management initiative, needs and requirements of AGENCY'S grants, contracts and programs. Propose and recommend electronic means to share data and automatically load CRM tools with data from other systems like the VAPP platform. Recommend CRM tools to integrate, measure, and track volume of client usage. And finally, identify deficiencies and the gaps needed to meet the needs of our veterans/families discovered during the interview cycle.

FINDINGS:

While the WDVA was correct in moving to preliminarily investigate off the shelf CRM systems, analysis proved that states would be better served by more directly utilizing data generated by the primary author and owner of veteran data – the Federal VA by extending the VBMS to encompass the needs of the states.

During the project WDVA volunteered to become the pilot for the states in creating a new module for the Federal VA VBMS system. As such WDVA and the other states would inherit all the existing functionality at the Federal level significantly reducing scope to state specific or unique processes. This will both vastly simplify the process and reduce the cost as well as assure access to authoritative data.

RECOMMENDATIONS:

WDVA should vigorously pursue this option and expand the data sharing strengths of new architectures and technologies in cooperation with all federal agencies with which it does business; most immediately the Departments of Defense, Labor and Education.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

e. TASKING:

CONTRACTOR will determine and propose the specifications for developing, implementing, and supporting a statewide Veteran specific search and resource Application on a mobile Web-based platform such as VAPP by addressing the following key APP design objectives:

[Note: there were no APP design objectives specified....]

FINDINGS:

This task cannot be performed because of its need to be integrated with the VRMS and NEXUS data structures which have yet to be funded and designed. However, the prototype for this mobile APP should be the VAPP.com platform which is the most flexible, cross-jurisdictional platform able to provide common access to all veterans and the veteran support ecosystem. VAPP's mobile presence is known to be more fully developed and broader in functional design than single purpose apps being developed by many support efforts.

RECOMMENDATIONS:

1. Incorporate this activity in alignment with the VAPP/NEXUS design effort.
2. Support expansion of VAPP.com by funding activities supporting veteran search functions. This can be done by creating a small subsidy for operations support tied to search numbers and outcomes.

f. TASKING:

CONTRACTOR will directly support the AGENCY staff with the design of work tools which auto generates real time process metrics.

- 1) Use metrics to determine AGENCY resource allocation a) Propose the structure for a utilization dashboard
- 2) Allow AGENCY counselors to monitor and guide Veterans to optimal resources
- 3) Use the tool to gather performance metrics to monitor the Transition process
- 4) Use the streamlining process to reduce repetitive searches or tasks
- 5) Allows for multiple counselors to work in concert on demanding cases

FINDINGS:

The majority of time and effort of this contract was dedicated to both analyzing and documenting the work processes – they can be found in detail in the department reports. The shift from building stand alone “APPs” to a server/database VRMS module obsoletes this work. However, each of these design objectives has been folded into the growing spec for how to make the VRMS be a self-documenting tool delivered as a strong, user-friendly self-service program. Development under the VA's Agile/SCRUM methodology will embed these characteristics



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

by design. One of the primary drivers for making the shift was to enable multiple counselors in different agencies or organizations to collaborate in support of a veteran or group of veterans.

RECOMMENDATIONS:

Add end users and counselors to the list of focus groups when crafting the prototype.

g. TASKING:

CONTRACTOR will direct Veterans efficiently and effectively to those resources

- 1) Provides a direct, secure, mobile "always on" communication channel between the Veteran and the AGENCY counselor
- 2) Allow Veterans to input their profile information prior to searching for resources
- 3) Streamline their search - effectively removing the "white noise" of non-applicable or distracting resources - making the process easy and more transparent
- 4) Reduce frustration through connectivity and real time response

FINDINGS:

Multiple products and strategies were investigated including: VAPP.com, 211, the National Resource Directory (NRD), Network of Care, etc. Only VAPP.com offers a mobile based solution with the platform capability of bringing all support agencies, including these others, to the veteran in one place, indexed and geocoded.

The white noise of uncoordinated resources is the single biggest challenge to the veteran. Veterans become overwhelmed and confused with an overabundance of un-vetted options.

There must be a tie from WDVA to these organizations to make the process easier and transparent – that means both an online protocol and content assessment and approval capability by WDVA. Providing feedback and eliminating fraudulent or poor performs is critical to maintaining the integrity of the system.

While search is based on an algorithm, both indexing and geocoding offer powerful parsing tools which will most efficiently and effectively steer veterans to the appropriate resources to provide maximum assistance.

RECOMMENDATIONS:

Put all such providers through a competitive process and commit to a mechanism for organizing, geocoding and standardizing resources. It is time for order to be pulled from the current chaos.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

h. TASKING:

CONTRACTOR will identify the impact of using state of art geocoding techniques to provide location relevancy to Veterans searches.

FINDINGS:

Segmenting searches and displaying results by geocoded layers is a primary presentation tool needed to parse the vast volume of data returned from general subject searches. The single most power feature needed by a veteran to separate noise from targeted results is the geo-location of the search objective. By applying geocoding to the resource base a veteran would be able to parse resources based on current location and up to “X” number of alternate locations, allowing a rapid and accurate return, which builds confidence in the tool and earns customer appreciation.

Geo-presentation is delivered under the User Interface design; however, knowing the intent will allow WDVA to align its resource base and set its design criteria for its partners and suppliers – giving maximum time for participation and compliance.

RECOMMENDATIONS:

Geo-code the resource base.

Set up all partners to utilize a common geo-coding protocol, ensuring compatibility across the enterprise.

Allow the Veteran to select up to five locations – such as relocation targets and the resources needed at each. In cases where broader selection is needed such as in selection of universities and other education objectives which drive relocation decisions, that number should be increased to ten.

i. TASKING:

CONTRACTOR will provide open ended functions to receive data from the Federal government and share data with county and city authorities, such as King County Veteran Programs currently being operated by the AGENCY.

FINDINGS:

Study revealed that only by increasing the scope of data sharing to become a truly “cross-jurisdictional” platform spanning all the veteran system stakeholders and participants can an optimally efficient and effective solution deliver the needed services to the veteran at the lowest cost.



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

WDVA is best able to make use of its data and the work being done by its partners by using VRMS as both a data repository for its own needs and a platform to offer coordinated resource sharing with county, city, commercial, and not for profit partners.

RECOMMENDATIONS:

Use VRMS as the core application on a common/shared platform. The table below reflects the number of WDVA process tasks across its programs have cross-jurisdictional dependencies with other WA State agencies, counties, local level, other states, VSOs, and federal agencies.

VAPP

Cross-Jurisdictional Process Tasks: Opportunities for Shared Platform



Cross-Jurisdictional Process Tasks	Process Task Totals	Percentage of Total Process Tasks
WA State DSHS	7	*2%
WA State Employment Security	11	3%
WA State SBCTC	5	1%
Other WA State Agency	2	1%
Other States	6	2%
County	22	6%
Local	17	5%
VSOs	23	6%
Federal-VA	72	20%
Federal-DOD	1	0%
Other Federal	7	2%

* 2% represents PARIS data: Medicaid to VA benefits

Extend specialty functions to the support and user community by dedicated applications which are designed to share data across applications.

Adopt a web service driven Software Open architecture framework upon which to both ground basic functionality and extend local or special processing as applications.



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &

Lori Grant, Operation Military Family COO

j. TASKING:

CONTRACTOR support the design of the National Guard, Reserve, and active duty transition lifecycle as defined by the VOW Act 2012 and resulting DOD guidance

- 1) Use to provide the mechanism to track, measure, and validate measureable outcomes in the period from 18 months prior to discharge and 18 months afterward
- 2) Provide guidance for each of the four major paths forward:
- 3) Education
- 4) Employment
- 5) Apprenticeships
- 6) Small Business

FINDINGS:

Most effort has been expended on the problem of supporting active duty transition; not only at the WDVA but everywhere. The processes and flowcharts in the departmental reports are primarily focused on active duty. The National Guard and Reserves have unaddressed issues due to their unique requirements involving dual service/civilian career paths, multiple mobilizations and demobilizations etc. which are the direct result of shifting from a Strategic Reserve to an Operational Reserve. The heritage of dealing with Guard and Reserve personnel has its origins in DoD's human resources systems which do not account for the fundamental shift in Guard and Reserve utilization. During the term of the contract, the Guard and Reserves have been inwardly focused on their own processes. It is believed that this is an ongoing issue which will lessen as WDVA assumes a stronger national profile as the pilot for the State VRMS module to the Federal VA's VBMS.

While many of the differences between the needs of the active duty, Guard and Reserve are profound, they are more structurally similar from a data standpoint than their processes would suggest. Investigation shows that differences appear to be able to be handled at the VRMS application layer as additional columns in tables tailored to their mode of service.

RECOMMENDATIONS:

Continue outreach and elevate through using the Congressional Delegation and VA contacts to speak with the highest levels of the Guard and Reserves to obtain policy support for changing how we support Guard and Reserve veterans.

Continue mapping common areas such as entering retiring reservists into Washington State schools and technical colleges, apprenticeship programs, jobs and small business tracks. Coordinate these activities with the appropriate agencies and encourage them to seek common platforms such as VAPP.com until WDVA is able to complete an approved platform which it can endorse as its platform of choice.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

k. TASKING:

CONTRACTOR will structure the requirements and determine the APP specifications for performing an online Traumatic Brain Injury (TBI) self-assessment rolled out on the VAPP platform. The APP will allow AGENCY to gather geocoded data on the needs and location of our veterans and other information to determine trends and to determine future resources in WA State.

FINDINGS:

The primary needs for the TBI app are to provide for:

- Self-Assessment
- Self- Registration
- Communication with TBI Program and WDVA Counselors
- Alerts
- Calendaring
- Data distribution
- Geocoding resources

RECOMMENDATIONS:

Include as an integrated component of VRMS rather than a standalone app. This will eliminate redundancy, lower development and sustainment costs and couple the TBI program within the core WDVA system.

Until then, build a hosted application on VAPP.com which can serve as a rapid prototyping tool offering the widest dissemination possible – recognizing that access to primary data from the authoritative Federal databases will be forthcoming but not immediately available until WDVA is selected for and tasked with developing the prototype for the State VRMS/NEXUS module to the Federal VA's VBMS.

l. TASKING:

CONTRACTOR will audit AGENCY'S marketing and messaging strategy. This will include a survey of images and library materials to determine both the scope and adequacy of current practices.

FINDINGS:

A LOGO inventory and assessment was performed by Heckler & Associates, a premiere NW branding boutique, which revealed many useful and pertinent observations concerning the WDVA logo and image library. Details are provided in the full report.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

WDVA is at a timely point to renew its images and logos during the upcoming overhaul of its website and social media strategy. Much of what is currently being used is dated and while good in its day, has been superseded by the state of the art.

RECOMMENDATIONS:

Upgrade the image bank to current commercial standards – reshoot workplace and workflow shots

Align images and logos with the new marketing and social media programs

- 1) **CONTRACTOR will design and create a more efficient marketing and messaging strategy for AGENCY programs based on its findings.**

FINDINGS:

See attached Marketing & Messaging report from Heckler for specifics. These findings outline the process which would be built from a comprehensive review of WDVA's objectives by stakeholders and focus groups of various users. This strategy will be used to recast the creative component – i.e. artwork and supporting image base as integrated into the website and social media strategy.

As much of the current practices and procedures are simply obsolete and the state of the art has moved far ahead, there is a reasonable expectation for significant gains in both effectiveness and lowering the cost of administering the media configuration management activities. Tools such as Drupal will allow dynamic content updates by end user groups lowering centralized Communication Department activity while encouraging involvement by WDVA work groups and even end users.

RECOMMENDATIONS:

- Perform a Situation Review with primary stakeholders
- Perform a market analysis from first principles
- Redesign the WDVA Website using current and technology to implement modern social media strategy.

- 2) **CONTRACTOR will provide advice and recommendations on brand consulting (analysis, equity measurements, and honing/focusing), Messaging and Graphic consulting and evaluation, and promotional materials consulting and creation.**

FINDINGS:

Heckler & Associates audited and reported on WDVA Branding. See the Appendix C for the full report of details.



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

RECOMMENDATIONS:

WDVA would benefit from performing the analysis and doing the organizational soul searching to build visual tools which relate to its user base and lower costs through more accurate portrayal of core ideas. This is especially true with work flows and procedures.

3 Phase 3

a. TASKING:

CONTRACTOR will produce and deliver the final approved VSM, electronically in Visio format.

Result: The following Visio files have been provided electronically.

Documentation Checklist	File Type
Dorothy-Hanson-Process-Maps.vsd	Visio
Jason-Alves-Process-Maps.vsd	Visio
Communications-Dept-Webmaster-Process-Maps.vsd	Visio
Melinda-Gourley-Process-Maps.vsd	Visio
Melinda-Gourley-Process-Maps-pt2.vsd	Visio
Jean-Perkins-Process-Maps.vsd	Visio
Malcolm-Leach-Process-Maps.vsd	Visio
Travis-Sayers-Process-Maps.vsd	Visio
Frank-Dickinson-process-maps.vsd	Visio
Kay-Spitzenberg-process-maps.vsd	Visio
Rebecca-Farber-process-maps.vsd	Visio
Robert-Bouick-Process-Maps.vsd	Visio
Venus-Bailey-Process-Maps.vsd	Visio
case-manager-process-maps.vsd	Visio
Lynda-Reese-Process-Maps.vsd	Visio
program-specialist-process-maps.vsd	Visio
VEMP-Webmaster-Process-Maps.vsd	Visio



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

b. TASKING:

CONTRACTOR will complete and deliver the Strategic Plan and Timeline, electronically in Microsoft Word 2010 format.

Result: The following Word file have been provided electronically: Technology Integration Plan-final.docx

c. TASKING:

CONTRACTOR will produce and deliver a Marketing and Messaging Strategy Overview, electronically in Microsoft Word 2010 format.

Result: See the Appendix C for the full report of details. The following Word file has also been provided electronically: WDVA Veteran Services MARKETING and MESSAG DB.docx



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

4 Appendix A

Interview notes documentation checklist, part 1 of 3

Documentation Checklist	File Type
Behavioral Health Services Binder	
<i>Tab 2 Interview Notes</i>	
Behavioral Health Services Program-v4-final.docx	Word
Behavioral Health Services Program-v4-final.pdf	PDF
Communications Department Binder	
<i>Tab 1 Interview Summary</i>	
COMMUNICATIONS-Dept-Heidi-Summary-Notes-Russell-final.docx	Word
COMMUNICATIONS-Dept-Heidi-Summary-Notes-Russell-final.pdf	PDF
<i>Tab 2 Interview Notes</i>	
Communications-Dept-Heidi-Audette-v3-1-final.docx	Word
Communications-Dept-Heidi-Audette-v3-1-final.pdf	PDF
Communications-WDVA-Website-PDF-binder.pdf	PDF
Financial Consultant Melinda Gourley Binder	
<i>Tab 1 Interview Summary</i>	
Financial Consultant-Summary-Notes-Russell-v3-2-final.docx	Word
Financial Consultant-Summary-Notes-Russell-v3-2-final.pdf	PDF
<i>Tab 2 Interview Notes</i>	
Financial-Consultant-Melinda-Gourley-Pt1-v3-2-final.docx	Word
Financial-Consultant-Melinda-Gourley-Pt1-v3-2-final.pdf	PDF
Financial-Consultant-Melinda-Gourley-Pt2-v3-2-final.docx	Word
Financial-Consultant-Melinda-Gourley-Pt2-v3-2-final.pdf	PDF
Financial & Homeless Employment Services Binder	
<i>Tab 2 Interview Notes</i>	
Financial-Homeless-Employment-Svcs-Pt1-v1-final.docx	Word
Financial-Homeless-Employment-Svcs-Pt1-v1-final.pdf	PDF
King County Homeless & Incarcerated Services Binder	
<i>Tab 1 Interview Summary</i>	
KingCount-Homeless-Incarcerated-Jan17-2013-RussellNotes-final.docx	Word
KingCount-Homeless-Incarcerated-Jan17-2013-RussellNotes-final.pdf	PDF
<i>Tab 2 Interview Notes</i>	
King County-Incarcerated Svcs-Dec-21-2012-Pt-1_v3-final.docx	Word



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
King County-Incarcerated Svcs-Dec-21-2012-Pt-1_v3-final.pdf	PDF
King County-Incarcerated Svcs-Dec-21-2012-Pt-2-v3-final.docx	Word
King County-Incarcerated Svcs-Dec-21-2012-Pt-2-v3-final.pdf	PDF
King County-Incarcerated Svcs-Dec-21-2012-Pt-3-v3-final.docx	Word
King County-Incarcerated Svcs-Dec-21-2012-Pt-3-v3-final.pdf	PDF
King County-Incarcerated Svcs-Jan-14-2013-Pt-4-v3-final.docx	Word
King County-Incarcerated Svcs-Jan-14-2013-Pt-4-v3-final.pdf	PDF
King County-Incarcerated Svcs-Jan-17-2013-Pt-5-3-final.docx	Word
King County-Incarcerated Svcs-Jan-17-2013-Pt-5-3-final.pdf	PDF
Service Center & DSHS Enhancement Binder	
Tab 1 Interview Summary	
Service Center-DSHS-Enhancement-SummaryNotes-Russell-final.docx	Word
Service Center-DSHS-Enhancement-SummaryNotes-Russell-final.pdf	PDF
Tab 2 Interview Notes	
SvcCenter-DSHS-Enhancement-v3-final.docx	Word
SvcCenter-DSHS-Enhancement-v3-final.pdf	PDF
Transitional Housing (Building 9) Services Binder	
Tab 1 Interview Summary	
Transitional Housing Summary-Summary-Notes-Russell-final.docx	Word
Transitional Housing Summary-Summary-Notes-Russell-final.pdf	PDF
Tab 2 Interview Notes	
Transitional Housing Services-Pt1-v3-final.docx	Word
Transitional Housing Services-Pt1-v3-final.pdf	PDF
Transitional Housing Services pt2-v3-final.docx.doc	Word
Transitional Housing Services pt2-v3-final.pdf	PDF
Veterans Estate Management Program (VEMP) Binder	
Tab 1 Interview Summary	
VEMP Summary-Russell-final.docx	Word
VEMP Summary-Russell-final.pdf	PDF
Tab 2 Interview Notes	
VEMP-Pt1-v3-2-final.docx	Word
VEMP-Pt1-v3-2-final.pdf	PDF
VEMP-Pt2-v3-2-final.docx	Word
VEMP-Pt2-v3-2-final.pdf	PDF



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

5 Appendix B

The following lists the business process documents completed for each WDVA program.

Documentation Checklist	File Type
Behavioral Health Services Binder	
<i>Tab 3 Process Mapping Documentation</i>	
Dorothy-Hanson-Step 1-Trigger-Events-Process Identification.docx	Word
Dorothy-Hanson-Step 1-Trigger-Events-Process Identification.pdf	PDF
Dorothy-Hanson-Step 2-Major Processes.docx	Word
Dorothy-Hanson-Step 2-Major Processes.pdf	PDF
Dorothy-Hanson-Step 3-Units in Processes.docx	Word
Dorothy-Hanson-Step 3-Units in Processes.pdf	PDF
Dorothy-Hanson-Step 4-Process Profile Worksheet-P1.docx	Word
Dorothy-Hanson-Step 4-Process Profile Worksheet-P1.pdf	PDF
Dorothy-Hanson-Step 4-Process Profile Worksheet-P2.docx	Word
Dorothy-Hanson-Step 4-Process Profile Worksheet-P2.pdf	PDF
Dorothy-Hanson-Step 4-Process Profile Worksheet-P3.docx	Word
Dorothy-Hanson-Step 4-Process Profile Worksheet-P3.pdf	PDF
Dorothy-Hanson-process-maps-PDF-binder-all-docs.pdf	PDF
Jason-Alves-Step 1-Trigger-Events-Process Identification.docx	Word
Jason-Alves-Step 1-Trigger-Events-Process Identification.pdf	PDF
Jason-Alves-Step 2-Major Processes.docx	Word
Jason-Alves-Step 2-Major Processes.pdf	PDF
Jason-Alves-Step 3-Units in Processes.docx	Word
Jason-Alves-Step 3-Units in Processes.pdf	PDF
Jason-Alves-Step 4-Process Profile Worksheet-P1.docx	Word
Jason-Alves-Step 4-Process Profile Worksheet-P1.pdf	PDF
Jason-Alves-Step 4-Process Profile Worksheet-P2.docx	Word
Jason-Alves-Step 4-Process Profile Worksheet-P2.pdf	PDF
Jason-Alves-Step 4-Process Profile Worksheet-P3.docx	Word
Jason-Alves-Step 4-Process Profile Worksheet-P3.pdf	PDF
Jason-Alves-Step 4-Process Profile Worksheet-P4.docx	Word
Jason-Alves-Step 4-Process Profile Worksheet-P4.pdf	PDF
Jason-Alves-Step 4-Process Profile Worksheet-P5.docx	Word
Jason-Alves-Step 4-Process Profile Worksheet-P5.pdf	PDF



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
Behavioral Health Services Binder	
Jason-Alves-Step 4-Process Profile Worksheet-P6.docx	Word
Jason-Alves-Step 4-Process Profile Worksheet-P6.pdf	PDF
Jason-Alves-process-maps-PDF-binder-all-docs.pdf	PDF
Tab 4 Process Maps	
Dorothy-Hanson-Process-Maps.vsd	Visio
Dorothy-Hanson-Process-Maps.pdf	PDF
Jason-Alves-Process-Maps.vsd	Visio
Jason-Alves-Process-Maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Dorothy-Hanson-March-25-2013.mp3	Audio
Dorothy Hanson-Phone-Call.docx	Word
Dorothy Hanson-Phone-Call.pdf	PDF
Jason-Alves-March-19-2013.mp3	Audio
Jason Alves-Phone-Call.docx	Word
Jason Alves-Phone-Call.pdf	PDF
Communications Department Binder	
Tab 3 Process Mapping Documentation	
1-Communications-Dept-Step 1-Trigger-Events-Process Identification.docx	Word
1-Communications-Dept-Step 1-Trigger-Events-Process Identification.pdf	PDF
2-Communications-Dept-Step 2-Major Processes.docx	Word
2-Communications-Dept-Step 2-Major Processes.pdf	PDF
3-Communications-Dept-Step 3-Units in Processes.docx	Word
3-Communications-Dept-Step 3-Units in Processes.pdf	PDF
4a-Communications-Dept-Step 4-Process-1-Profile Worksheet.docx	Word
4a-Communications-Dept-Step 4-Process-1-Profile Worksheet.pdf	PDF
4b-Communications-Dept-Step 4-Process-1-Profile Worksheet.docx	Word
4b-Communications-Dept-Step 4-Process-1-Profile Worksheet.pdf	PDF
4c-Communications-Dept-Step 4-Process-1-Profile Worksheet.docx	Word
4c-Communications-Dept-Step 4-Process-1-Profile Worksheet.pdf	PDF
4d-Communications-Dept-Step 4-Process-1-Profile Worksheet.docx	Word
4d-Communications-Dept-Step 4-Process-1-Profile Worksheet.pdf	PDF
4e-Communications-Dept-Step 4-Process-1-Profile Worksheet.docx	Word
4e-Communications-Dept-Step 4-Process-1-Profile Worksheet.pdf	PDF



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
Communications Department Binder	
4f-Communications-Dept-Step 4-Process-1-Profile Worksheet.docx	Word
4f-Communications-Dept-Step 4-Process-1-Profile Worksheet.pdf	PDF
Communications-Dept-Process-Maps-PDF-Binder-all-docs.pdf	PDF
Tab 4 Process Maps	
Communications-Dept-Webmaster-Process-Maps.vsd	Visio
Communications-Dept-Webmaster-Process-Maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Jennifer-Montgomery-March-18-2013.mp3	Audio
Jennifer Montgomery-phone-call-notes-March-18-2013.docx	Word
Jennifer Montgomery-phone-call-notes-March-18-2013.pdf	PDF
Jennifer Montgomery-process-summary-March-18-2013.docx	Word
Jennifer Montgomery-process-summary-March-18-2013.pdf	PDF
Financial Consultant Melinda Gourley Binder	
Tab 3 Process Mapping Documentation	
Melinda-Gourley-Step 1-Trigger-Events-Process Identification.docx	Word
Melinda-Gourley-Step 1-Trigger-Events-Process Identification.pdf	PDF
Melinda-Gourley-Step 2-Major Processes.docx	Word
Melinda-Gourley-Step 2-Major Processes.pdf	PDF
Melinda-Gourley-Step 3-Units in Processes.docx	Word
Melinda-Gourley-Step 3-Units in Processes.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P1.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P1.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P2.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P2.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P3.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P3.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P4.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P4.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P5.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P5.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P6.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P6.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P7.docx	Word



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
Financial Consultant Melinda Gourley Binder	
Melinda-Gourley-Step 4-Process Profile Worksheet-P7.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P8.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P8.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P9.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P9.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P10.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P10.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P11.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P11.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P12.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P12.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P13.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P13.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P14.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P14.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P15.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P15.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P16.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P16.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P17.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P17.docx	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P18.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P18.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P19.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P19.pdf	PDF
Melinda-Gourley-Step 4-Process Profile Worksheet-P20.docx	Word
Melinda-Gourley-Step 4-Process Profile Worksheet-P20.pdf	PDF
Melinda-Gourley-Process-Map-PDF-binder-all-docs.pdf	PDF
Tab 4 Process Maps	
Melinda-Gourley-Process-Maps.vsd	Visio
Melinda-Gourley-Process-Maps-Pt1.pdf	PDF
Melinda-Gourley-Process-Maps-pt2.vsd	Visio
Melinda-Gourley-Process-Maps-pt2.pdf	PDF



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
Financial Consultant Melinda Gourley Binder	
Tab 5 Telephone Interview Transcript	
Melinda-process-meeting-3-17-2013.mp3	Audio
MaryGorley-transcription-notes.doc	Word
MaryGorley-transcription-notes.pdf	PDF
Melinda-Gourley-Phone-call-notes.docx	Word
Melinda-Gourley-Phone-call-notes.pdf	PDF
Financial & Homeless Employment Services Binder	
Tab 3 Process Mapping Documentation	
Jean-Perkins-Step 1-Trigger-Events-Process Identification.docx	Word
Jean-Perkins-Step 1-Trigger-Events-Process Identification.pdf	PDF
Jean-Perkins-Step 2-Major Processes.docx	Word
Jean-Perkins-Step 2-Major Processes.pdf	PDF
Jean-Perkins-Step 3-Units in Processes.docx	Word
Jean-Perkins-Step 3-Units in Processes.pdf	PDF
Jean-Perkins-Step 4-Process Profile Worksheet-P1.docx	Word
Jean-Perkins-Step 4-Process Profile Worksheet-P1.pdf	PDF
Jean-Perkins-Step 4-Process Profile Worksheet-P2.docx	Word
Jean-Perkins-Step 4-Process Profile Worksheet-P2.pdf	PDF
Jean-Perkins-Step 4-Process Profile Worksheet-P3.docx	Word
Jean-Perkins-Step 4-Process Profile Worksheet-P3.pdf	PDF
Jean-Perkins-PDF-binder-all-docs.pdf	PDF
Malcolm-Leach-Step 1-Trigger-Events-Process Identification.docx	Word
Malcolm-Leach-Step 1-Trigger-Events-Process Identification.pdf	PDF
Malcolm-Leach-Step 2-Major Processes.docx	Word
Malcolm-Leach-Step 2-Major Processes.pdf	PDF
Malcolm-Leach-Step 3-Units in Processes.docx	Word
Malcolm-Leach-Step 3-Units in Processes.pdf	PDF
Malcolm-Leach-Step 4-Process Profile Worksheet-P1.docx	Word
Malcolm-Leach-Step 4-Process Profile Worksheet-P1.pdf	PDF
Malcolm-Leach-Step 4-Process Profile Worksheet-P2.docx	Word
Malcolm-Leach-Step 4-Process Profile Worksheet-P2.pdf	PDF
Malcolm-Leach-Step 4-Process Profile Worksheet-P3.docx	Word
Malcolm-Leach-Step 4-Process Profile Worksheet-P3.pdf	PDF



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
Financial & Homeless Employment Services Binder	
Malcolm-Leach-PDF-binder-all-docs.pdf	PDF
Travis-Sayers-Step 1-Trigger-Events-Process Identification.docx	Word
Travis-Sayers-Step 1-Trigger-Events-Process Identification.pdf	PDF
Travis-Sayers-Step 2-Major Processes.docx	Word
Travis-Sayers-Step 2-Major Processes.pdf	PDF
Travis-Sayers-Step 3-Units in Processes.docx	Word
Travis-Sayers-Step 3-Units in Processes.pdf	PDF
Travis-Sayers-Step 4-Process Profile Worksheet-P1.docx	Word
Travis-Sayers-Step 4-Process Profile Worksheet-P1.pdf	PDF
Travis-Sayers-Step 4-Process Profile Worksheet-P2.docx	Word
Travis-Sayers-Step 4-Process Profile Worksheet-P2.pdf	PDF
Travis-Sayers-Step 4-Process Profile Worksheet-P3.docx	Word
Travis-Sayers-Step 4-Process Profile Worksheet-P3.pdf	PDF
Travis-Sayers-PDF-binder-all-docs.pdf	PDF
Tab 4 Process Maps	
Jean-Perkins-Process-Maps.vsd	Visio
Jean-Perkins-Process-Maps.pdf	PDF
Malcolm-Leach-Process-Maps.vsd	Visio
Malcolm-Leach-Process-Maps.pdf	PDF
Travis-Sayers-Process-Maps.vsd	Visio
Travis-Sayers-Process-Maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Dean-Motoyama-Jean-Perkins-March-18-2013.mp3	Audio
Jean Perkins-transcription-notes.docx	Word
Jean-Perkins-Phone-call-notes.docx	Word
Jean-Perkins-Phone-call-notes.pdf	PDF
Malcolm-Leach-March-18-2013.mp3	Audio
Malcolm Leach transcript.doc	Word
Malcolm-Leach-Phone-call-notes.docx	Word
Malcolm-Leach-Phone-call-notes.pdf	PDF
travis-sayers.mp3	Audio
Travis Sayers-transcript.docx	Word
Travis-Sayers-Phone-call-notes.docx	Word



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
King County Homeless & Incarcerated Services Binder	
Travis-Sayers-Phone-call-notes.pdf	PDF
Tab 3 Process Mapping Documentation	
Frank-Dickinson-Step 1-Trigger-Events-Process Identification.docx	Word
Frank-Dickinson-Step 1-Trigger-Events-Process Identification.pdf	PDF
Frank-Dickinson-Step 2-Major Processes.docx	Word
Frank-Dickinson-Step 2-Major Processes.pdf	PDF
Frank-Dickinson-Step 3-Units in Processes.docx	Word
Frank-Dickinson-Step 3-Units in Processes.pdf	PDF
Frank-Dickinson-Step 4-Process Profile Worksheet-P1.docx	Word
Frank-Dickinson-Step 4-Process Profile Worksheet-P1.pdf	PDF
Frank-Dickinson-Step 4-Process Profile Worksheet-P2.docx	Word
Frank-Dickinson-Step 4-Process Profile Worksheet-P2.pdf	PDF
Frank-Dickinson-Step 4-Process Profile Worksheet-P3.docx	Word
Frank-Dickinson-Step 4-Process Profile Worksheet-P3.pdf	PDF
Frank-Dickinson-Step 4-Process Profile Worksheet-P4.docx	Word
Frank-Dickinson-Step 4-Process Profile Worksheet-P4.pdf	PDF
Frank-Dickinson-process-maps-PDF-binder-all-docs.pdf	PDF
Kay-Spitzenberg-Step 1-Trigger-Events-Process Identification.docx	Word
Kay-Spitzenberg-Step 1-Trigger-Events-Process Identification.pdf	PDF
Kay-Spitzenberg-Step 2-Major Processes.docx	Word
Kay-Spitzenberg-Step 2-Major Processes.pdf	PDF
Kay-Spitzenberg-Step 3-Units in Processes.docx	Word
Kay-Spitzenberg-Step 3-Units in Processes.pdf	PDF
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P1.docx	Word
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P1.pdf	PDF
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P2.docx	Word
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P2.pdf	PDF
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P3.docx	Word
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P3.pdf	PDF
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P4.docx	Word
Kay-Spitzenberg-Step 4-Process Profile Worksheet-P4.pdf	PDF
Kay-Spitzenberg-process-maps-PDF-binder-all-docs.pdf	PDF
Rebecca-Farber-process-maps-PDF-binder-all-docs.pdf	PDF



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
King County Homeless & Incarcerated Services Binder	
Rebecca-Farber-Step 1-Trigger-Events-Process Identification.docx	Word
Rebecca-Farber-Step 1-Trigger-Events-Process Identification.pdf	PDF
Rebecca-Farber-Step 2-Major Processes.docx	Word
Rebecca-Farber-Step 2-Major Processes.pdf	PDF
Rebecca-Farber-Step 3-Units in Processes.docx	Word
Rebecca-Farber-Step 4-Process Profile Worksheet-P1.docx	Word
Rebecca-Farber-Step 4-Process Profile Worksheet-P1.pdf	PDF
Rebecca-Farber-Step 4-Process Profile Worksheet-P2.docx	Word
Rebecca-Farber-Step 4-Process Profile Worksheet-P2.pdf	PDF
Tab 4 Process Maps	
Frank-Dickinson-process-maps.vsd	Visio
Frank-Dickinson-process-maps.pdf	PDF
Kay-Spitzenberg-process-maps.vsd	Visio
Kay-Spitzenberg-process-maps.pdf	PDF
Rebecca-Farber-process-maps.vsd	Visio
Rebecca-Farber-process-maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Frank-Dickinson-March-15-2013.mp3	Audio
Frank Dickinson-transcription-notes.doc	Word
Frank-Dickinson-Phone-call-notes.docx	Word
Frank-Dickinson-Phone-call-notes.pdf	PDF
Kay-Spitzenberg-March-15-2013.mp3	Audio
Kay-Spitzenberg-Phone-call-notes.docx	Word
Kay-Spitzenberg-Phone-call-notes.pdf	PDF
Rebecca-Farber-March-15-2013.mp3	PDF
Rebecca Farber-transcript.doc	Word
Rebecca-Farber-Phone-call-notes.docx	Word
Rebecca-Farber-Phone-call-notes.pdf	PDF
Service Center & DSHS Enhancement Binder	
Tab 3 Process Mapping Documentation	
Robert-Bouick-Step 1-Trigger-Events-Process Identification.docx	Word
Robert-Bouick-Step 1-Trigger-Events-Process Identification.pdf	PDF
Robert-Bouick-Step 2-Major Processes.docx	Word



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
Service Center & DSHS Enhancement Binder	
Robert-Bouick-Step 2-Major Processes.pdf	PDF
Robert-Bouick-Step 3-Units in Processes.docx	Word
Robert-Bouick-Step 3-Units in Processes.pdf	PDF
Robert-Bouick-Step 4-Process Profile Worksheet-P1.docx	Word
Robert-Bouick-Step 4-Process Profile Worksheet-P1.pdf	PDF
Robert-Bouick-Step 4-Process Profile Worksheet-P2.docx	Word
Robert-Bouick-Step 4-Process Profile Worksheet-P2.pdf	PDF
Robert-Bouick-Step 4-Process Profile Worksheet-P3.docx	Word
Robert-Bouick-Step 4-Process Profile Worksheet-P3.pdf	PDF
Robert-Bouick-Step 4-Process Profile Worksheet-P4.docx	Word
Robert-Bouick-Step 4-Process Profile Worksheet-P4.pdf	PDF
Robert-Bouick-PDF-binder-all-docs.pdf	PDF
Venus-Bailey-Step 1-Trigger-Events-Process Identification.docx	Word
Venus-Bailey-Step 1-Trigger-Events-Process Identification.pdf	PDF
Venus-Bailey-Step 2-Major Processes.docx	Word
Venus-Bailey-Step 2-Major Processes.pdf	PDF
Venus-Bailey-Step 3-Units in Processes.docx	Word
Venus-Bailey-Step 3-Units in Processes.pdf	PDF
Venus-Bailey-Step 4-Process Profile Worksheet-P1.docx	Word
Venus-Bailey-Step 4-Process Profile Worksheet-P1.pdf	PDF
Venus-Bailey-Step 4-Process Profile Worksheet-P2.docx	Word
Venus-Bailey-Step 4-Process Profile Worksheet-P2.pdf	PDF
Venus-Bailey-Step 4-Process Profile Worksheet-P3.docx	Word
Venus-Bailey-Step 4-Process Profile Worksheet-P3.pdf	PDF
Venus-Bailey-Step 4-Process Profile Worksheet-P4.docx	Word
Venus-Bailey-Step 4-Process Profile Worksheet-P4.pdf	PDF
Venus-Bailey-Step 4-Process Profile Worksheet-P5.docx	Word
Venus-Bailey-Step 4-Process Profile Worksheet-P5.pdf	PDF
Venus-Bailey-PDF-binder-all-docs.pdf	PDF
Tab 4 Process Maps	
Robert-Bouick-Process-Maps.vsd	Visio
Robert-Bouick-Process-Maps.pdf	PDF
Venus-Bailey-Process-Maps.vsd	Visio



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Venus-Bailey-Process-Maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Venus-Bailey-phone-call-march-14-2013.mp3	Audio
Documentation Checklist	File Type
Service Center & DSHS Enhancement Binder	
Venus-Bailey-Process-Maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Venus-Bailey-phone-call-march-14-2013.mp3	Audio
Venus-Bailey-Phone-Call-Transcript-March.doc	Word
Venus-Bailey-Phone-call-notes.docx	Word
Venus-Bailey-Phone-call-notes.pdf	PDF
Transitional Housing (Building 9) Services Binder	
Tab 3 Process Mapping Documentation	
Lynda-Reese-Step 1-Trigger-Events-Process Identification.docx	Word
Lynda-Reese-Step 1-Trigger-Events-Process Identification.pdf	PDF
Lynda-Reese-Step 2-Major Processes.docx	Word
Lynda-Reese-Step 2-Major Processes.pdf	PDF
Lynda-Reese-Step 3-Units in Processes.docx	Word
Lynda-Reese-Step 3-Units in Processes.pdf	PDF
Lynda-Reese-Step 4-Process Profile Worksheet-P1.docx	Word
Lynda-Reese-Step 4-Process Profile Worksheet-P1.pdf	PDF
Lynda-Reese-Step 4-Process Profile Worksheet-P2.docx	Word
Lynda-Reese-Step 4-Process Profile Worksheet-P2.pdf	PDF
Lynda-Reese-Step 4-Process Profile Worksheet-P3.docx	Word
Lynda-Reese-Step 4-Process Profile Worksheet-P3.pdf	PDF
Lynda-Reese-Step 4-Process Profile Worksheet-P4.docx	Word
Lynda-Reese-Step 4-Process Profile Worksheet-P4.pdf	PDF
Lynda-Reese-Step 4-Process Profile Worksheet-P5.docx	Word
Lynda-Reese-Step 4-Process Profile Worksheet-P5.pdf	PDF
Lynda-Reese-Step 4-Process Profile Worksheet-P6.docx	Word
Lynda-Reese-Step 4-Process Profile Worksheet-P6.pdf	PDF
Lynda-Reese-Step 4-Process Profile Worksheet-P7.docx	Word
Lynda-Reese-Step 4-Process Profile Worksheet-P7.pdf	PDF
Lynda-Reese-process-map-PDF-binder-all-docs.pdf	PDF
Program Specialist Step 1-Trigger-Events-Process Identification.docx	Word



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
Transitional Housing (Building 9) Services Binder	
Program Specialist Step 1-Trigger-Events-Process Identification.pdf	PDF
Program Specialist Step 2-Major Processes.docx	Word
Program Specialist Step 2-Major Processes.pdf	PDF
Program Specialist Step 3-Units in Processes.docx	Word
Program Specialist Step 3-Units in Processes.pdf	PDF
Program Specialist Step 4-Process Profile Worksheet-P1.docx	Word
Program Specialist Step 4-Process Profile Worksheet-P1.pdf	PDF
Program Specialist Step 4-Process Profile Worksheet-P2.docx	Word
Program Specialist Step 4-Process Profile Worksheet-P2.pdf	PDF
Program-Specialist-process-maps-PDF-binder-all-docs.pdf	PDF
Randy-Viers-Step 1-Trigger-Events-Process Identification.docx	Word
Randy-Viers-Step 1-Trigger-Events-Process Identification.pdf	PDF
Randy-Viers-Step 2-Major Processes.docx	Word
Randy-Viers-Step 2-Major Processes.pdf	PDF
Randy-viers-Step 3-Units in Processes.docx	Word
Randy-viers-Step 3-Units in Processes.pdf	PDF
Randy-Viers-Step 4-Process Profile Worksheet-P1.docx	Word
Randy-Viers-Step 4-Process Profile Worksheet-P1.pdf	PDF
Randy-Viers-Step 4-Process Profile Worksheet-P2.docx	Word
Randy-Viers-Step 4-Process Profile Worksheet-P2.pdf	PDF
Randy-Viers-Step 4-Process Profile Worksheet-P3.docx	Word
Randy-Viers-Step 4-Process Profile Worksheet-P3.pdf	PDF
Randy-Viers-Step 4-Process Profile Worksheet-P4.docx	Word
Randy-Viers-Step 4-Process Profile Worksheet-P4.pdf	PDF
Randy-Viers-Step 4-Process Profile Worksheet-P5.docx	Word
Randy-Viers-Step 4-Process Profile Worksheet-P5.pdf	PDF
Randy-viers-Case-managers-PDF-binder-all-docs.pdf	PDF
Tab 4 Process Maps	
case-manager-process-maps.vsd	Visio
case-manager-process-maps.pdf	PDF
Lynda-Reese-Process-Maps.vsd	Visio
Lynda-Reese-Process-Maps.pdf	PDF
program-specialist-process-maps.vsd	Visio



WDVA Project: Strategic Technology Integration Plan

Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO

Documentation Checklist	File Type
program-specialist-process-maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Lynda-Reese-March-15-2013.mp3	Audio
Lynda-Reese-Phone-call-transcript.doc	Word
Lynda-Reese-Phone-call-notes.docx	Word
Lynda-Reese-Phone-call-notes.pdf	PDF
randy-viers.mp3	Audio
Transitional Housing (Building 9) Services Binder	
Randy-viers-phone-call-transcript.doc	Word
Randy-viers-phone-call-transcript.pdf	PDF
Veterans Estate Management Program (VEMP) Binder	
Tab 3 Process Mapping Documentation	
VEMP-Step 1-Trigger-Events-Process Identification.docx	Word
VEMP-Step 1-Trigger-Events-Process Identification.pdf	PDF
VEMP-Step 2-Major Processes.docx	Word
VEMP-Step 2-Major Processes.pdf	PDF
VEMP-Step 3-Units in Processes.docx	Word
VEMP-Step 3-Units in Processes.pdf	PDF
VEMP-Step 4a-Process Profile Worksheet.docx	Word
VEMP-Step 4a-Process Profile Worksheet.pdf	PDF
VEMP-Step 4b-Process Profile Worksheet.docx	Word
VEMP-Step 4b-Process Profile Worksheet.pdf	PDF
VEMP-Step 4c-Process Profile Worksheet.pdf	PDF
VEMP-Step 4c-Process Profile Worksheet.docx	Word
VEMP-Step 4d-Process Profile Worksheet.docx	Word
VEMP-Step 4d-Process Profile Worksheet.pdf	PDF
VEMP-Step 4e-Process Profile Worksheet.docx	Word
VEMP-Process-Maps-PDF-binder-all-docs.pdf	PDF
Tab 4 Process Maps	
VEMP-Webmaster-Process-Maps.vsd	Visio
VEMP-Webmaster-Process-Maps.pdf	PDF
Tab 5 Telephone Interview Transcript	
Dean-Motoyama-Jean-Perkins-March-18-2013.mp3	Audio
Dean Motoyama-transcription-notes.doc	Word



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

Documentation Checklist	File Type
VEMP-Phone-call-notes.docx	Word
VEMP-Dean Motoyama-phone-call.doc	Word
VEMP-Dean Motoyama-phone-call.pdf	PDF



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

6 Appendix C: MARKETING & MESSAGING AUDIT

Branding & Marketing Overview

The composition and meaning of the WDVA Veteran Services “brand” is defined by how the agency goes into the marketplace and interacts with its users and partners. In the context of delivering government services, marketing efforts are not typically driven by commercial objectives, but by those measuring mission effectiveness, readiness, and outreach. While the language may differ, the basic principles and mechanics are fundamentally the same.

One key foundation principle of branding is that branding equity is built every day all day with every interaction with veterans, agencies, and community organizations. People’s perception of the brand is the sum total of the relational capital created by each of these transactions. The objective of implementing branding and marketing initiatives is to help users to know and connect with the scope and depth of WDVA Veteran Services.

Clear communication is a primary pillar of effective branding and marketing. The quality and clarity of images, graphics, web site navigation, and content management structure largely determine the user’s experience and therefor opinion of the service. These in turn are determined by a deliberate and thorough analysis of layout, ease of use, the ability to establish and hold a “conversation” with the site or blogging services to readily obtain information sought through self-service or seamlessly engage with a WDVA Veteran Services counselor when necessary.

Branding and Marketing is both an art and science. In order to maximize the impact and effect of the Marketing and Messaging Audit, Operation Military Family partnered with Heckler & Associates, world class branding marketing experts, to perform this portion of the WDVA Veteran Services Marketing and Messaging strategy audit.

Current Practices Overview

The process began with an offsite review of the Veteran Services Logos, Website and Image Library.

Key Scope/Adequacy findings:

Logo/logotype and support line presentation would benefit from design refinements.

- Current logo is unnecessarily complex, dated and doesn’t integrate support lines well
- Appeal and professionalism could be largely improved by revision, total replacement is not necessary
- Periods of communication overhaul are opportune for logo revisions and signaling change



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

Use of photography feels unprofessional and could be more appealing and effective

- Commission, direct, purchase stock or retouch key photographs to create more consistent, attractive and professional communications and webpages
- Much of the existing library is not of high enough quality to anchor main presentations and should be edited for use in support presentations
 - Fewer, better photography is preferable to many pictures of varying quality

Presentation materials we have seen, such as the website are inconsistent and rudimentary in design

- Color palette, fonts and graphic devices, such as content dividers, should be standardized
- Templates for common documents such as press releases should be developed

Current written content should be edited and better organized, augment some topline copy

- Current language is suitable base for most descriptive needs, but would benefit from making intro/overview information fast to read and create logic for getting more detail.
- High-visibility presentations such as section heads and homepage warrant considered headlines/copy as these have a strong effect on brand image, may align with other marketing messages if developed

Current Web Strategy Assessment

The current approach to building the online interface to users, supporting agencies and the community is simply obsolete. This is an identified issue and is a departmental priority to replace both the website and social media strategy with new tools that provide the advantages of current technical designs.

Technical Limitations

- The WDVA Veteran Services website is at end of useable life
 - Technically obsolete
 - Limited social media capability
 - No mobile capability
 - Past infrastructure funding did not support modern technologies or content management practices
 - Content management is critical to the user experience and satisfaction
 - Functionally difficult to use
 - Navigation strategy needs a complete overhaul
- Social Media is currently handled in a discrete, non-integrated manner
 - Modern practices integrate social media as a front end tool and outreach enhancement mechanism to extend enterprise reach into the community.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

Recommendations to design and create a more efficient marketing and messaging strategy for WDVA Veteran Services:

Heckler Associates recommends outlining a communication strategy designed to serve outreach goals of WDVA Veteran Services.

- The plan should outline and prioritize objectives, assess ongoing, long-term and goals and examine short-term needs. Overarching objectives such as raising awareness or improving donations establish the fundamental pillars of a strategy.
- A tactical, marketing plan and sequence to address goals through various means relative to budget would be developed and discussed. With a communication strategy is established, marketing plans are typically reviewed annually.
- Branding, marketing and communication projects that are green-lighted, from topline brand presentations to outreach campaigns would be then be outlined, cost-estimated and produced.

Communication Strategy Planning Process

The Heckler Associates team recommends beginning a communication plan with a Situation Review meeting with the primary stakeholders. A series of questions about the organization from both an overall business and brand communications perspective will explore the boundaries and key functionality needed to be captured by the upgrades. The goal is to have a firm understanding of the organization and current state of all outreach efforts and the elements, materials, services, etc. in use and the intended target audiences. Topics for the meeting include the following:

Current Business Overview

- Affirm mission, initiatives and objectives
- Understand the organization structure and divisions
- Define attributes that you want to be known for
- How does the organization raise capital and from whom
- Describe key challenges to mission, image and organization
- Define the competition and discuss your respective strengths & weaknesses

Outreach Review

- Define the target audiences, goals, challenges and relative priority of each
- Share current outreach elements
 - These include brochures, mailers, stickers, ads, photo assets, core messages, graphics, social media communications, etc.



WDVA Project: Strategic Technology Integration Plan

**Authors: Russell Ervin, Operation Military Family CTO &
Lori Grant, Operation Military Family COO**

- Discuss the level of effectiveness of the various outreach items
- Is there any specific desired outreach elements not currently in use
- Discuss outreach elements to specific to each area of the organization
- Are there other organization's outreach examples you admire or dislike?
- Share any industry and organization communication sensitivities, such tonality, topics, etc.

Looking Ahead.... The Way Forward

Anticipating predictable changes and making allowance for them is critical to both optimizing the current design and mitigating the impact and expense of future changes.

Key areas to investigate:

- How might the organization evolve over the next 2-5 years, any new services, audiences, etc.?
- How is the marketplace changing?
- What specific plans are currently on the table?